



MANAGING CONTENT  
APPLICATION INTEGRATION  
PROCESS IMPROVEMENT

# DTI Records Management



Today, critical business content needs to be retained and secured. But how do you best manage the overwhelming amount of physical records that must be available for immediate retrieval for compliance, audits, contractual agreements, and other purposes?

**The solution...** DTI Records Management software makes it feasible for organizations to mitigate risk and develop corporate retention requirements, while reducing legal liability and costs. It is crucial that all organization's physical records be properly managed and easily accessible to increase user productivity, support effective decision-making, and

comply with retention requirements. Equally important as saving content, is destroying it once its legal retention period has expired. *DTI Records Management is the answer...*

## DTI Records Management Software offers key capabilities:

- Centralizes records and retention administration
- Reduce risk
- Standardizes a catalog of all content
- Provides audit trails and improves compliance
- Improves employee productivity

**Retention Policy** – DTI RM provides a single tool to manage all of your physical records stored onsite or at

A screenshot of the DTI Records Management software interface. The window title is "DTI Records Management - Retention Detail - Basis Code (DTI\_FIXED\_RM1)". The main content area is titled "Retention Detail - Basis Code" and contains a form for defining retention rules. The form includes fields for "Retention Code" and "Destruction Code", and a "Basis Code" field. Below these is a section for "Retention Basis Code: Description" with input fields for "FY" and "End of FY". A dropdown menu is labeled "Base Retention period on the (select one):". There are three radio button options: "Create Date", "From Date", and "Permanent". Below these are two more radio button options: "Submit Date" and "To Date". There are also three radio button options: "Permanent", "Indefinite", and "Calculate Retention based upon Fiscal Year" (which is checked). Below these are two checkboxes: "Calculate Retention at the END of the year." and "Calculate Retention at the END of the month." The bottom of the window has a toolbar with buttons for "Add New", "Update", "Reset", "Find", "Browse", "Delete", and "Close". There is also a "Set Required Fields" button.



DTI Records Management - Series Detail (DTI\_FIXED\_RM1)

**Series Detail**

Department: CORP

Series Code: AccountingAnnual

Title: Accounting in house for 1 year

Description: Hold in house for one year then transfer to Records Management holding company for 7 years

Retention Code: ACC Accounting

In House Retention: FY Basis Plus: 1 Years and 0 Months

Total Retention: FY Basis Plus: 7 Years and 0 Months

Set Required Fields

+ Add New Update Reset Find Browse X Delete Close

offsite storage facilities. DTI RM allows users to easily request documents from 3<sup>rd</sup> party storage facilities.

The DTI RM solution provides a web interface to manage physical records from a single environment across the enterprise. It provides records managers with a single view into all retention schedules, audit histories, and the ability to track files, facilitating the process of discovering and declaring records.

**Approval Hierarchy** – DTI RM allows companies to designate a member from each department to approve the destruction of content. The system allows the RM manager to place items on hold for various reasons (Tax audits, Legal, etc). Content cannot be destroyed if the content has been placed on hold. This feature prevents unintended or deliberate destruction of records when there is a requirement to maintain records for a defined period of time.

**Barcode** – DTI RM allows users to leverage bar code technology to track files they move from one location to another. As files are moved to various locations, the barcode is scanned and the DTI RM solution maintains the physical location of the file within the RM database. This allows users to access records quicker and more efficiently.

**DTI Records Management** provides records managers a single environment from which to control retention policies for all physical records across the enterprise. **Contact us** today to learn how DTI Records Management can get you started with a single centralized physical records and retention management solution.



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